



North Carolina Department of Health and Human Services
Division of Medical Assistance

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Beverly Eaves Perdue, Governor
Lanier M. Cansler, Secretary

Craig L. Gray, MD, MBA, JD, Director

April 28, 2010

RE: Revised Estate Recovery Forms

Dear County Director of Social Services:

Effective May 1, 2010, the following Estate Recovery forms are updated to match the State Plan. The following forms are updated:

DMA -5051, Your Estate May be Subject to Medicaid Recovery, is revised to include the disability determination standard, substantial hardship, and the CARELINE's current operational hours. The N.C. General Statute 108A-70.5 regarding Estate Recovery has been added.

DMA-5052, Your Estate is Subject to Medicaid Recovery is revised to include Personal Care Services (PCS) and remove Medicare cost sharing expenses. The disability determination standard is added. The N.C. General Statute 108A-70.5 regarding Estate Recovery has been added.

DMA-5054, Medicaid Estate Recovery Claim, is revised to include the definition of "hardship" and reflect 200% of the Federal Poverty Level as the correct threshold for "undue hardship." The address for undue hardship claims has been updated.

DMA-5056, Estate Recovery Information Form, is revised to include form DMA-5054 in the list of required information to be sent to the state. The term "legal" is added to the second and third questions when referring to the deceased recipient's spouse.

If you have any questions regarding this information, please contact your Medicaid Program Representative.

Sincerely,

Craig L Gray, MD, MBA, JD, Director

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